

Amendments To The Claims

A complete list of all the presently or formerly pending claims in the application is provided below, with suitable headings to show the status of each claim and, where appropriate, its current text. This listing of claims will replace all prior versions, and listings of claims in this application.

Listing of Claims

1. (Currently amended) A computer implementation method for deciding the quantity of shares of each security selected to form an investment portfolio, comprising the steps of:

~~providing an investment portfolio comprising selected~~ selecting securities from selected economic sectors in order to establish an investment portfolio;

weighting said selected economic sectors to provide a sector weight for ~~said~~ each selected economic sector;

weighting said selected securities from said each selected economic sector to provide an intra sector weight for ~~said~~ each selected security;

determining a ~~dependent~~ first weight of said each selected security according to (1) said intra sector weight of said each selected security~~[[,]]~~ and (2) a predetermined percentage of said sector weight of said each selected security's economic sector ~~and a predetermined percentage;~~

determining ~~an equal-weighted~~ a second weight of said each selected security ~~according to~~ by equally dividing the remaining percentage of said sector weight of said each selected security's economic sector~~[[,]]~~ ~~said predetermined percentage among and the number of~~ selected securities from said each selected security's economic sector; and

adding said ~~dependent~~ first weight to said ~~equal-weighted~~ second weight of said each selected security to yield a portfolio weight of said each selected security, wherein at least one of said steps is performed by a computer.

2. (Currently amended) The method of claim 1, wherein said sector weight of said each selected economic sector is determined by weighting said each selected economic sector according to a relative market capitalization of said each selected economic sector within as compared to the total market capitalization of said selected economic sectors.

3. (Currently amended) The method of claim 1, wherein said intra sector weight of said each selected security is determined by weighting said each selected security according to the a relative market capitalization of said each selected security within as compared to the total market capitalization of all selected securities from said each selected security's economic sector.

4. (Currently amended) The method of claim 1, wherein said ~~dependent first~~ weight of said each selected security is a capitalization-weighted weight dependent on the relative market capitalization of said each selected security within all selected securities from said each selected security's economic sector and dependent on the relevant market capitalization of said each selected security's economic sector within all selected economic sectors.

5. (Original) The method of claim 1 wherein said selected securities are from the group of securities comprises the 500 stocks that make up the Standard and Poor's 500 Composite Stock Price Index.

6. (Original) The method of claim 1 wherein said selected economic sectors comprise eight economic sectors.

7. (Original) The method of claim 1 wherein said selected securities comprises 5 securities from said each selected economic sector.

8. (Original) The method of claim 1 wherein the predetermined percentage is 40%.

9. (Currently amended) The method of ~~claim 4~~ claim 1 wherein the step of determining said ~~capitalization-weighted first~~ weight of said each selected security ~~further~~ comprising:

(a) multiplying said intra sector weight of said each selected security by said sector weight of said each selected security's economic sector; and

(b) multiplying the result of said step (a) by said predetermined percentage, wherein said steps (a) and (b) are performed by the computer.

10. (Currently amended) The method of claim 9 wherein the step of determining said ~~equal-weighted~~ second weight of said selected securities ~~further~~ comprising:

(a) subtracting said predetermined percentage from 100%;

(b) dividing the result from said subtraction by the number of selected securities from said each selected security's economic sector; and

(c) multiplying the result from said division by said sector weight of said each selected security's economic sector, wherein said steps (a), (b) and (c) are performed by the computer.

11. (Original) The method of claim 1 further comprising purchasing said selected securities from said selected economic sectors, said purchased securities thereby forming said investment portfolio.

12. (Original) The method of claim 1 further comprising creating a pooled investment vehicle comprising said selected securities from said selected economic sectors.

13. (Original) The method of claim 1 further comprising creating a variable annuity comprising said selected securities from said selected economic sectors.

14. (Original) The method of claim 1 further comprising creating an investment account comprising said selected securities from said selected economic sectors.

15. (Original) The method of claim 1 further comprising creating an open-ended mutual fund comprising said selected securities from said selected economic sectors.

16. (Original) The method of claim 1 wherein said method is implemented on a computer as a software application program.

17. (Original) The method of claim 1 further comprising generating a securities database that may be stored, executed, and used by a computer.

18. (Original) The method of claim 1 wherein said investment portfolio is generated and stored as a computer file within said computer implementation.

19. (Original) The method of claim 1 wherein a sorting algorithm is used in said selecting a predetermined number of economic sectors and said selecting a predetermined number of securities.